

Exhibit 19

Sent: Fri 1/8/2021 4:31:17 PM (UTC)
From: laurengreen@google.com
To: laurengreen@google.com, schramm@google.com, tomgrinsted@google.com, lukejefferson@google.com, suppe@google.com, amusil@google.com
Subject: AAAA_JlIDdY-MBI-THREADED:-xv_qNul2bM%%2021-01-07T21:31:16.190447

laurengreen@google.com 2021-01-08T16:31:16.190Z

Friday afternoon discussion starter: what would you say is the strategic benefit of Google photos?

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Friday afternoon discussion starter: what would you say is the strategic benefit of Google photos?

laurengreen@google.com 2021-01-08T16:32:34.771Z

have been seeing discussion about its value for ML; for driving loyalty to Android (although you can still get Google Photos on iOS); as well as intrinsic engagement (although i don't think we monetise Photos in any meaningful way?)

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schramm@google.com 2021-01-08T16:32:46.099Z

should we have history off for this?

Deleted on2022-07-02T16:32:46.099Z

should we have history off for this?

laurengreen@google.com 2021-01-08T16:35:15.388Z

i can't decide!

Deleted on2022-07-02T16:35:15.388Z

i can't decide!

laurengreen@google.com 2021-01-08T16:37:06.981Z

is it any different to discussing why Nvidia is buying ARM?

Deleted on2022-07-02T16:37:06.981Z

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schramm@google.com 2021-01-08T16:38:38.635Z

Well I think our chats about google products are more likely to come up in court 😊

Deleted on2022-07-02T16:38:38.635Z

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tomgrinsted@google.com 2021-01-08T16:48:01.526Z

Right now it doesn't _feel_ risky. But just communicate with care.

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tomgrinsted@google.com 2021-01-08T16:48:13.365Z

Interested why you're wondering Lauren.

Deleted on2022-07-02T16:48:13.365Z

Interested why you're wondering Lauren.

tomgrinsted@google.com 2021-01-08T16:53:11.092Z

My rank speculation is for two or three main reasons:

1. Photos _are_ social. With sharing, liking, and commenting it is actually the closest thing we have to a successful social product.
2. I think that there is a strong argument for a set of core services that "complete" an out-of-the-box OS offer. Email, messaging, browser, camera + photos with sync etc.
3. Photos are a wealth of personally-driven "information". So it's pretty core to the mission.

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3. Photos are a wealth of personally-driven "information". So it's pretty core to the mission.

tomgrinsted@google.com 2021-01-08T16:53:39.214Z

(also very interested in the storage subscription becomes a long-term commercial success too)

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(also very interested in the storage subscription becomes a long-term commercial success too)

lukejefferson@google.com 2021-01-08T16:55:43.364Z

What Tom shared, plus Search is moving to the real-world > Photos/Lens > AR (next platform)

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schramm@google.com 2021-01-08T16:55:49.784Z

Photos are one of the most important mobile use cases. Google having it's own cross-platform photos platform makes it a lot easier for users to migrate between platforms.

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schramm@google.com 2021-01-08T16:56:14.838Z

In the same way we have cross platform contacts, browser, etc.

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schramm@google.com 2021-01-08T16:56:35.407Z

And we're trying to provide a competitive cross platform messaging experience with RCS.

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And we're trying to provide a competitive cross platform messaging experience with RCS.

schramm@google.com 2021-01-08T16:59:42.642Z

So I would put:

1. Core platform feature that Android has to have
2. Enables easier migration pathway from iOS
3. Hedge for future social / ML / AR / personal use cases

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So I would put:

1. Core platform feature that Android has to have
2. Enables easier migration pathway from iOS
3. Hedge for future social / ML / AR / personal use cases

laurengreen@google.com 2021-01-08T17:00:00.702Z

Interested because it's a 1bn user product that we don't directly monetise today (AFAIK - I don't think albums /printing is significant though storage is more so)

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schramm@google.com 2021-01-08T17:00:49.305Z

It doesn't have the engagement that YouTube does for ads monetization either

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laurengreen@google.com 2021-01-08T17:03:10.432Z

I agree it's a must have core feature but Play has other core apps that we haven't polished to anything like the degree of photos eg. Books

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laurengreen@google.com 2021-01-08T17:03:46.695Z

So I think a lot of the rationale sits with the other points made above

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suppe@google.com 2021-01-08T17:04:04.340Z

A lot of it is ads - when we compete against FBs identity graph, the more users we have using Google products extends our reach of users who have Google Accounts, and therefore increases the # of users we can show ads to with personalized targeting.

This was especially important 6-7 years ago, when FB could brag that they had a single identity for a users across devices (since you likely logged into FB on your mobile device AND your laptop). Back then,, use of GAIA for user targeting wasn't consolidated. It was different depending on the Google product you used.

On Android obviously this isn't strictly necessary, but as noted, having Photos makes Android more attractive.

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suppe@google.com 2021-01-08T17:04:49.434Z

@Alex Musil was likely on the other side of this - selling hard to advertisers that FB's cross-device identity graph was way better than Google's.

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schramm@google.com 2021-01-08T17:18:03.410Z

Good point Steve regarding the benefit of increasing GAIA penetration for ads

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laurengreen@google.com 2021-01-08T17:21:08.100Z

Thanks all for sharing your ideas. A few things I hadn't thought of - I knew this group would have some thoughtful answers 😊

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Thanks all for sharing your ideas. A few things I hadn't thought of - I knew this group would have some thoughtful answers 😊

tomgrinsted@google.com 2021-01-08T17:24:03.653Z

FYI - we are directly monetising as for a normal consumer, subscribing to photos storage is probably the only "space" sub that makes sense.

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tomgrinsted@google.com 2021-01-08T17:24:18.764Z

That's already normalised by Apple (and Flickr before it)

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tomgrinsted@google.com 2021-01-08T17:25:00.703Z

I wonder if that's more about covering it's own costs somewhat, vs. a strategic bet.

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laurengreen@google.com 2021-01-08T17:25:18.705Z

Y but i imagine % Photos users with Storage sub penetration is still very low

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suppe@google.com 2021-01-08T17:25:47.628Z

I don't know, I think people really struggle with photos capacity

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I don't know, I think people really struggle with photos capacity

suppe@google.com 2021-01-08T17:25:53.228Z

I don't have any data though

Deleted on2022-07-02T17:25:53.228Z

I don't have any data though

tomgrinsted@google.com 2021-01-08T17:25:58.876Z

Although the now defunct "free unlimited photo storage" was a major selling point for pixels 1-3 (backing up Dan's point about major mobile use-case)

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Although the now defunct "free unlimited photo storage" was a major selling point for pixels 1-3 (backing up Dan's point about major mobile use-case)

laurengreen@google.com 2021-01-08T17:26:01.885Z

True. I wonder if it's still higher than those for Drive

Deleted on2022-07-02T17:26:01.885Z

schramm@google.com 2021-01-08T17:26:03.110Z

I'd imagine they're only trying to cover costs, but also useful to get the payment details, and having a sub relationship has got to increase retention.

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schramm@google.com 2021-01-08T17:26:34.460Z

There were interesting Hiroshi level conversations when I was working on Android Backup and Drive.

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tomgrinsted@google.com 2021-01-08T17:26:34.561Z

For sure!

Deleted on2022-07-02T17:26:34.561Z

For sure!

laurengreen@google.com 2021-01-08T17:26:39.410Z

@Tom Grinsted yes part of what got my noodling on this was the recent change to costs policy

Updated on2021-01-08T17:26:53.692Z

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Deleted on2022-07-02T17:26:39.410Z

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schramm@google.com 2021-01-08T17:27:07.136Z

(conversations that I don't want to talk about on here; but can share on VC some time)

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tomgrinsted@google.com 2021-01-08T17:27:43.871Z

Wise

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Wise

tomgrinsted@google.com 2021-01-08T17:27:57.773Z

(adds to my Dan 121 Todo list)

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laurengreen@google.com 2021-01-08T17:29:31.139Z

As well as retention, I'm sure it also helps upsell - lower friction once you already have a sub relationship with a user

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laurengreen@google.com 2021-01-08T17:31:10.519Z

The question is what we'd upsell to...other than more storage, our other upsells are a bit of a leap from photos today (music, gaming etc)

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schramm@google.com 2021-01-08T17:32:01.666Z

I think the plan is for Google One to include the other services at some point

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schramm@google.com 2021-01-08T17:32:07.482Z

I could imagine it including hardware

Deleted on2022-07-02T17:32:07.482Z

I could imagine it including hardware

schramm@google.com 2021-01-08T17:32:33.143Z

(it's under Rick's Hardware org)

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(it's under Rick's Hardware org)

laurengreen@google.com 2021-01-08T17:33:45.063Z

Interesting. And if you care about photos then you care about camera so I could imagine something there

Updated on2021-01-08T17:34:06.488Z

Interesting. And if you care about photos then you care about camera so I could imagine something there

Deleted on2022-07-02T17:33:45.063Z

Interesting. And if you care about photos then you care about camera so I could imagine something there

amusil@google.com 2021-01-08T17:37:33.824Z

Great conversion. I think you've covered the strongest rationale (key mobile use case for Android/ecosystem, GAIA driver). It's often tough to directly quantify this indirect value at such scale, so at a certain point cost management of the strategy becomes inevitable.

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tomgrinsted@google.com 2021-01-08T17:56:40.667Z

To Dan's point, Google One _is_ the upsell atm

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To Dan's point, Google One _is_ the upsell atm

tomgrinsted@google.com 2021-01-08T17:57:35.591Z

My ... uncharitable ... assessment is that Google's org culture is stopping us from getting as competing as apple+ and Amazon prime

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tomgrinsted@google.com 2021-01-08T17:59:50.923Z

But aligning all the products within a unified subs offer if very top-down.

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But aligning all the products within a unified subs offer if very top-down.

amusil@google.com 2021-01-08T18:30:59.850Z

Google One will require some real top down vision and force of will to make work

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Google One will require some real top down vision and force of will to make work

tomgrinsted@google.com 2021-01-08T19:04:57.210Z

For sure

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For sure

